

WHAT IS CLAIMED IS:

1. A method for allocating operating expenses to deal activity using a network-based system including a server system coupled to a centralized database and at least one client system, said method comprising the steps of:

5 receiving business information;

allocating operating expenses to a business unit's processes;

computing an average deal cost;

calculating deal costs per product by adjusting the average deal cost to reflect complexity differences between products since each product tends to have a different level of complexity that drives different processes and costs; and

10 providing various management reports to track operating expenses by different categories to facilitate strategic decision making processes and improve operational productivity.

2. A method according to Claim 1 wherein said step of receiving information further comprises the step of inputting at least one of a Number of Deals for a Specific Financial Reporting Period, Time spent per process as a percentage of Total Year, Deal Activity Segmentation Factors, Operating Expenses by a Business Unit, and an Average Cycle Time from Qualified Lead to Close in Days by Business Unit by Product Name.

20 3. A method according to Claim 2 wherein Deal Activity Segmentation Factors include at least one of a Name of a Business Unit, a Product Name, a Deal Status identifying whether the Deal is Active, Close or Terminated, a Deal Milestone Stages, a Deal Approval Level.

25 4. A method according to Claim 3 wherein Product Names include at least one of a Loan, a Lease, a Common Equity, and a Preferred Equity.

5. A method according to Claim 3 wherein Deal Milestone Stages include at least one of a Qualified Lead, Pre-Proposal Issue, Proposal Issue, Deal Awarded, Presented to Approval Committee and, Approved and Closed.

6. A method according to Claim 1 wherein said step of receiving business information further comprises the step of storing business information.

7. A method according to Claim 6 wherein said step of storing business information further comprises the steps of:

tracking business information on a real time basis;

storing business information on a real time basis; and

updating the centralized database with revised business information on a real time basis to provide up-to-date information instantaneously to the user upon a request.

8. A method according to Claim 7 wherein said step of updating the centralized database with revised business information further comprises at least one of adding new information, deleting the current information and editing the current information stored in the database.

9. A method according to Claim 7 wherein said step of updating the centralized database further comprises the step of entering information on-line.

10. A method according to Claim 2 wherein said step of inputting information further comprises the step of entering information at least through one of a voice activation command and a device connected to the client system.

11. A method according to Claim 1 wherein said step of providing various management reports in response to an inquiry further comprises the steps of:

downloading requested information from a server system; and

displaying requested information on a client system in response to the inquiry.

12. The method according to Claim 11 wherein said step of displaying information further includes the step of displaying an HTML document downloaded by the server system.

13. A method according to Claim 1 wherein said step of providing various management reports further comprises the step of printing requested information in a pre-determined format.

5 14. A method according to Claim 1 wherein said step of providing various management reports further comprises the steps of:

printing at least one of Operating Cost by Product identifying Total Costs, Close Deal Costs, Dead Deal Costs, Hit Rate, Close Deal Unit Cost, Total Cost per Close Deal and Operating Cost by Process identifying Cost associated with Lead Generation, Cost associated with PIC, Cost associated with Proposal Issue, Cost associated with Underwritten Deals, Cost associated with Deals Approved, Cost associated with Deals Closed, and Cost associated with all Deals;

printing at least one of an Operating cost for Loans by Process Report, an Operating Cost by Product Report, and an Operating cost for all Products by Process Report; and

15 printing at least one of an Operating costs for Leases by Process Report, an Operating costs for Equity by Process Report, an Operating costs for Common equity by Process Report, and an Operating costs for Preferred Equity by Process Report.

20 15. A method according to Claim 1 wherein said step of providing various management reports further comprises the steps of:

determining at least one of average deal unit costs, beginning and ending inventory for active deals, total cost for terminated and closed deals, operation productivity, and product pricing; and

25 printing at least one of average deal unit costs, beginning and ending inventory for active deals, total cost for terminated and closed deals, operation productivity, and product pricing.

16. The method according to Claim 1 wherein the client system and the server system are connected via a network and wherein the network is one of a wide area network, a local area network, an intranet and the Internet.

17. A method for allocating operating expenses to deal activity based on various data inputs to determine operations productivity, product pricing, and strategic decision making, said method comprising the steps of:

receiving business information which includes at least one of at least one of a Number of Deals for a Specific Financial Reporting Period, Time spent per process as a percentage of Total Year, Deal Activity Segmentation Factors, Operating Expenses by a Business Unit, and an Average Cycle Time from Qualified Lead to Close in Days by Business Unit by Product Name;

allocating operating expenses to a business unit's processes;

computing an average deal cost;

calculating deal costs per product by adjusting the average deal cost to reflect complexity differences between products since each product tends to have a different level of complexity that drives different processes and costs; and

providing various management reports to track operating expenses by different categories to facilitate strategic decision making processes.

18. A method according to Claim 17 wherein said step of providing various management reports further comprises the steps of:

printing at least one of Operating Cost by Product identifying Total Costs, Close Deal Costs, Dead Deal Costs, Hit Rate, Close Deal Unit Cost, Total Cost per Close Deal and Operating Cost by Process identifying Cost associated with Lead Generation, Cost associated with PIC, Cost associated with Proposal Issue, Cost associated with Underwritten Deals, Cost associated with Deals Approved, Cost associated with Deals Closed, and Cost associated with all Deals;

printing at least one of an Operating cost for Loans by Process Report, an Operating Cost by Product Report, and an Operating cost for all Products by Process Report; and

printing at least one of an Operating costs for Leases by Process Report, an Operating costs for Equity by Process Report, an Operating costs for Common equity by Process Report, and an Operating costs for Preferred Equity by Process Report.

19. A web-based system for allocating operating expenses utilizing a cost allocation model, said system comprising:

a client system comprising a browser;

a data storage device for storing information;

5 a server system configured to be coupled to said client system and said database, said server system further configured to:

receive business information;

allocate operating expenses to a business unit's processes;

compute an average deal cost;

10 calculate deal cost per product by adjusting the average deal cost to reflect complexity differences between products; and

provide various management reports to track operating expenses by different categories.

20. A system according to Claim 19 wherein said server system further configured to receive at least one of a Number of Deals for a Specific Financial Reporting Period, Time spent per process as a percentage of Total Year, Deal Activity Segmentation Factors, Operating Expenses by a Business Unit, and an Average Cycle Time from Qualified Lead to Close in Days by Business Unit by Product Name.

21. A system according to Claim 20 wherein Deal Activity Segmentation Factors include at least one of a Name of a Business Unit, a Product Name, a Deal Status identifying whether the Deal is Active, Close or Terminated, a Deal Milestone Stages, a Deal Approval Level.

22. A system according to Claim 20 wherein Product Names include at least one of a Loan, a Lease, a Common Equity, and a Preferred Equity.

23. A system according to Claim 20 wherein a Deal Milestone Stage includes at least one of a Qualified Lead, Pre-Proposal Issue, Proposal Issue, Deal Awarded, Presented to Approval Committee and, Approved and Closed.

24. A system according to Claim 19 wherein said server system further configured to store business information.

25. A system according to Claim 24 wherein said server system further configured to:

5 track business information on a real time basis;

store business information on a real time basis; and

update the centralized database with revised business information on a real time basis to provide up-to date information instantaneously to the user upon a request.

10 26. A system according to Claim 25 wherein said server system further configured to update the database by at least one of adding new information, deleting the current information and editing the current information stored in the database.

15 27. A system according to Claim 25 wherein said server system further configured to update the database instantaneously by accepting the business information entered on-line.

20 28. A system according to Claim 25 wherein said server system further configured to update the database instantaneously by accepting the business information at least through one of a voice activation command and a device connected to the client system.

29. A system according to Claim 19 wherein said server system further configured to:

download requested information from a server system; and

25 display requested information on a client system in response to the inquiry.

30 30. A system according to Claim 19 wherein said server system further configured to print requested information in a pre-determined format.

31. A system according to Claim 19 wherein said server system further configured to display an HTML document downloaded by the server system.

32. A system according to Claim 19 wherein said server system further configured to print at least one of Operating Cost by Product identifying Total Costs, Close Deal Costs, Dead Deal Costs, Hit Rate, Close Deal Unit Cost, Total Cost per Close Deal and Operating Cost by Process identifying Cost associated with Lead Generation, Cost associated with PIC, Cost associated with Proposal Issue, Cost associated with Underwritten Deals, Cost associated with Deals Approved, Cost associated with Deals Closed, and Cost associated with all Deals.

33. A system according to Claim 19 wherein said server system further configured to print at least one of an Operating cost for Loans by Process Report, an Operating Cost by Product Report, and an Operating cost for all Products by Process Report.

34. A system according to Claim 19 wherein said server system further configured to print at least one of an Operating costs for Leases by Process Report, an Operating costs for Equity by Process Report, an Operating costs for Common equity by Process Report, and an Operating costs for Preferred Equity by Process Report.

35. A system according to Claim 19 wherein said server system further configured to:

determine at least one of average deal unit costs, beginning and ending inventory for active deals, total cost for terminated and closed deals, operation productivity, and product pricing; and

print at least one of average deal unit costs, beginning and ending inventory for active deals, total cost for terminated and closed deals, operation productivity, and product pricing.

36. The system according to Claim 19 wherein the client system and the server system are connected via a network and wherein the network is one of a wide area network, a local area network, an intranet and the Internet.

37. A system according to Claim 19 wherein said client system is further configured with:

a displaying component; and

5 a sending component to send an inquiry to the server system so that the server system can process and download the requested information to the client system.

38. A system according to Claim 37 wherein the sending component functions in response to a click of a mouse button.

10 39. A system according to Claim 37 wherein the sending component functions in response to a voice command.

40. The client system of Claim 37 wherein said system is further configured to be protected from access by unauthorized individuals.

15 41. A system according to Claim 19 wherein said server system is further configured with a displaying component for displaying various user interfaces to the user, a receiving component for receiving an inquiry to provide information from one of a plurality of users, a collection component for collecting information from users into the centralized database, a tracking component for tracking information on an on-going basis, and an accessing component for accessing the centralized database and causing the retrieved information to be displayed on the
20 client system.

42. A system according to Claim 41 wherein said server system further configured with a processing component for searching and processing received inquiries against the data storage device containing a variety of information collected by the collection component.

25 43. A system according to Claim 41 wherein said server system further configured with a retrieving component to retrieve information from the data storage device.

44. A system according to Claim 41 wherein said server system further configured with an information fulfillment component that downloads the

requested information after retrieving from the data storage device to the plurality of users in the order in which the requests were received by the receiving component.

5 45. A system according to Claim 19 wherein said server system further configured to receive input directly from a plurality of individuals and update the centralized database to reflect the current allocation of operating expenses by the business unit at a given time.

46. A computer program embodied on a computer readable medium for allocating operating expenses to facilitate strategic decision making process, comprising:

10 a code segment that receives business information;

a code segment that allocates operating expenses to a business unit's processes;

a code segment that computes an average deal cost;

15 a code segment that calculates deal cost per product by adjusting the average deal cost to reflect complexity differences between products since each product tends to have a different level of complexity that drives different processes and costs; and

20 a code segment that provides various management reports to track operating expenses by different categories to facilitate strategic decision making process and improve operational productivity.

47. The computer program as recited in Claim 46 further includes a code segment that:

tracks information on a real time basis; and

25 stores information on a real time basis by updating stored information by adding the new information to the centralized database on a real time basis to provide up-to date information instantaneously to the user upon a request.

48. The computer program as recited in Claim 47 further includes a code segment that allows at least one of adding new information, deleting the current information and editing the current information stored in the database.

49. The computer program as recited in Claim 47 further includes a code segment that enters information on-line.

50. The computer program as recited in Claim 47 further includes a code segment that enters information at least through one of a voice activation command and a device connected to the client system.

51. The computer program as recited in Claim 47 further includes a code segment that prints requested information.

52. The computer program as recited in Claim 47 further includes a code segment that displays an HTML document downloaded by the server system.

53. The computer program as recited in Claim 47 wherein the network is a wide area network operable using a protocol including at least one of TCP/IP and IPX.

54. The computer program as recited in Claim 47 wherein the data is received from the user via a graphical user interface.

55. The computer program as recited in Claim 47 wherein the client system and the server system are connected via a network and wherein the network is one of a wide area network, a local area network, an intranet and the Internet.

56. The computer program as recited in Claim 47, and further comprising a code segment that monitors the security of the system by restricting access to unauthorized individuals.